FamilyMeans
LEGACY CIRCLE

PLANNED GIFT LETTER OF INTENT

Because of my/our special regard for the mission of FamilyMeans, and realizing the importance of planned gifts to the organization's future, I/we have made the following provision(s) for FamilyMeans in my/our estate plan(s):

WILL
- ❒ a gift of a specific amount;
- ❒ a gift of a specific item or property;
- ❒ a percentage gift of the residue of my estate (___%);
  - ❒ the above gift is not contingent.

TRUST
- ❒ a gift of a specific amount;
- ❒ a gift of a specific item or property;
- ❒ a percentage gift of the residue of my trust (___%);
  - ❒ the above gift is not contingent.

My/our trust is ❒ revocable ❒ irrevocable

OTHER (for example, life insurance and retirement plans)

❒ I/we have _____
_____

Gift Amount: the approximate current value of my/our gift is $ _____

Gift Designation: _____

Recognition:
- ☐ May use publicly. *Preferred listing:* _____
- ☐ Please keep confidential and anonymous

By signing this Letter of Intent, I/we reaffirm my/our commitment to FamilyMeans. However, this letter shall not be binding upon my/our estate, and the information contained herein shall be used for FamilyMeans purposes only.

_____ _____
Donor Legal Name Date

_____ _____
Donor Legal Name Date

_____ _____
Agency representative Date